

Step 1: From the Supply Chain dropdown	n, select Stock Item List .
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Step 2: Using the green filter bar, search for the Name of the Stock Item you need to transfer. Highlight the item and right-click. Select the **Transfer** button.

rectory Location	on Site Facilities is • Work Orders • Stock Item List Squ sociate Stockroom	PM - Inspections - Sup Jare Toilet Seat	oly Chain • Cleans •	Lookun LIPC:
rag a column hea	der here to group by t	hat column.		
Needs Approval	Category	Name		Part/Item #
8		squ	Right-click	
	Plumbing	Square Toilet Seat	New Purc	hase Transaction
			Transfer	
			Show/Hic	le Columns
			Reset Col	umns to Default
			Export to	Evcel

Step 3: Update the Date if necessary (defaults to today). Enter a Reason if desired. In the orange Transfer column, select the stockroom you're removing the items from and enter a **negative number** for the item being transferred. Then, in the same column, add the number of items you're transferring to the correct stockroom(s).



You cannot subtract more items than what the stockroom currently has in inventory. You can transfer items to multiple stockrooms at once, but the total in the grey box must equal 0 before you're able to click OK

Transfer Square Toilet Seat (STS95)			×			
Transfer Date: 9/13/2024 12:55 PM						
Reason: re-stocking Housekeeping closet						
			- 1			
Stockroom	On Hand	Т	ransfer			
Engineering Closet	10		-4			
Housekeeping Closet	1		4			
One Valley Lodge	15		0			
			<u> </u>			
			0			
	ОК	Cance	el			

Step 4: Or you can transfer from the **Stock Item List** screen, by highlighting the selected stock item and clicking **Edit**.

File Organization	Site Facilities Tools Help					
Directory Locations	Work Orders • PM • Inspections • Su	pply Chain 🔹 Cleans 🔹				
Welcome Page Sto	ck Item List					
New Stock Item Assoc	tiate Stockroom Edit Delete C Snow I	nactive Items Acquire + Lookup UPC:				
Drag a column header	here to group by that commn.					
Needs Approval	Category	Name	Part/Item # Qty			
	Plumbing	square Square Toilet Seat	=			
		🔕 Asgard One Valley Lodge				
		File Organization Site	Facilities Tools Help			
		Directory Locations + Work	Directory Locations • Work Orders • PM • Inspections • Supply Chair			
		Welcome Page Stock Item	List Square Toilet Seat			
		Name: Square Toilet Se	eat			
hen the Stoc	k Item screen opens	Category: Plumbing	Category: Plumbing			
	actions tab open the	Default Cost/Lisit				
act the Trane		Default Cost/Onit	0.00 Default Price/Unit			
ect the Trans	drop down ond color		Stockrooms Transactions Stock Reductions Purchasing Work Order Usage			
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ect the Trans Transaction Transferred	drop-down, and selec and repeat Step 3.	Stockrooms Transactions Stoc View the Last: 1 Month Drag a column header here to Transaction Grou Stockroom	k Reductions Purchasing Work Order Usage			
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Step 5. The new Transfer actions will now appear under the Transactions Tab of the selected Stock Item screen

🔕 Asgard On	e Valley Lodge (Training C	Drg)				
File Organiz	ation Site Facilities	Tools Help				
Directory Acco	ount List Expense Search	Locations - Assets	Work Order	s • PM • Ins	pections •	Supply Chain • Clea
Welcome Page	Stock Item List Squ	are Toilet Seat				
Name:	Square Toilet Seat		1	tem/Part#:	STS95	
Category:	Plumbing		~	External	ID:	
Default Cost/U	nit: 0.00 🜩	Default Price/	Unit	0.00	Total (Qty in Stock:
Stockrooms Tra	nsactions Stock Reduction	s Purchasing Work Ord	der Usage UPCs	Log		
View the Last: 1	Month 🔨 - 🗎	New Transaction •	Edit Delete			
Drag a column	header here to group by	that column.				
Transaction Gro	u Stockroom	Date	Туре	Quantity	Count Afte	Description
	11 Engineering Closet	09/13/2024 12:55	Transferred	-4	4	re-stocking Housekee
-9						